



# Thrift Savings Plan BULLETIN

02-U-11

for Service TSP Representatives

**Subject:** Revised Form TSP-U-60, Request for a Transfer Into the TSP

**Date:** April 12, 2002

The Federal Retirement Thrift Investment Board has revised Form TSP-U-60, Request for a Transfer Into the TSP. A copy of [Form TSP-U-60](#) is available from the uniformed services section of the TSP Web site ([www.tsp.gov](http://www.tsp.gov)).

**Dissemination of Form TSP-U-60.** Participants can obtain Form TSP-U-60 from the uniformed services section of the TSP Web site or from the TSP Service Office (telephone number: 504-255-6000). Services will not be responsible for providing the form to participants, and consequently will not receive supplies of this form.

**Changes to Form TSP-U-60.** The Economic Growth and Tax Relief Reconciliation Act of 2001 allows the TSP to accept transfers and rollovers from more types of eligible retirement plans. Consequently, effective April 1, 2002, the TSP will accept transfers and rollovers of eligible section 403(b) annuities, 457(b) plans, Simplified Employee Pensions (SEPs), and traditional individual retirement accounts (IRAs) in addition to transfers and rollovers already accepted. The Federal Employees' Retirement System Act (FERSA) does not allow the TSP to accept after-tax balances; therefore, transfers from IRAs (and all other plans) must consist solely of balances that will be subject to income tax on distribution. The form has been revised to reflect the increased portability and to require the participant to certify to the tax status of the funds.

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**Inquiries:** Questions concerning this bulletin should be addressed to the Federal Retirement Thrift Investment Board at **202-942-1460**.

**Chapter:** This bulletin may be filed in Chapter 2, General Information.

**Supersedes:** This bulletin supersedes TSP Bulletin 02-U-2, Request for a Transfer Into the TSP (Form TSP-U-60) dated February 5, 2002.

**Completion of Form TSP-U-60.** The back of Form TSP-U-60 contains detailed instructions for completing the form. Section I (Information About You), Section II (Information About Your Funds), and Section III (Your Certification) must be completed by the participant and then sent to the financial institution or the plan administrator. Section IV (Certification by Plan or IRA) must be completed by the plan administrator or the trustee of the traditional IRA before it is sent to the TSP record keeper at the address on the back of the form.

A handwritten signature in black ink, reading "Pamela-Jeanne Moran". The signature is written in a cursive, flowing style.

PAMELA-JEANNE MORAN  
Deputy Director  
Office of External Affairs